

Phoenix Project
Process Definition – General Ledger

Process	<i>Creating Organizations</i>
Process Number	<i>GL – 037</i>

Description of Process

Create a new organization. Organizations are created whenever there is a change in structure, such as the creation of a new department or cost center within an agency. Organization values represent any divisional breakdown of an entity into operating units such as different bureaus in a state government. In combination with other ChartField values, they form the basis for organization budgets that track expenditures and revenues. The State of Georgia will create Organization values at the Business Unit SetID level, which will include Activities as well as true Organizations.

Input to Process

Organization Change Request is written up, signed, assigned an identifier and approved. The organization is then entered into PeopleSoft.

Output of Process

New organization is created and is accessible to all business units having access to the SetID under which the organization was created.

Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Use	Organization

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Business Process Description

Process Description	Responsibility (Agency/Centralized)
<p><u>Step 1: Complete request form to create a new organization</u></p> <p>Using the forms provided to you (see attached), submit your request to the individual authorized to approve organization changes, usually someone at a supervisory level. If valid, the request will be input at the agency level. Otherwise, the request will be returned to you for corrective action or with an explanation for the denial of the request.</p>	Agency
<p><u>Step 2: Create identifiers for the new organization</u></p> <p>Enter the SetID and Organization Code for the organization you wish to create. The SetID should be equal to the business unit for the organization you are creating.</p>	Agency
<p><u>Step 3: Define your organization</u></p> <p>Enter the Effective Date and Status for your organization. The Effective Date can be set to the current or a future period and determines the date on which the organization will go into effect. The Status refers to the availability of the organization for use in journal processing. For all new organizations, the Status should be set to "Active." If the Status is set to "Inactive" you will not see that organization when prompting for a list during journal entry.</p> <p>Enter a short description to identify your organization. PeopleSoft uses the short description on panels and online inquiries with limited display space. Enter a longer description in the space provided to include further detail on your organization. PeopleSoft uses the description system-wide in prompt lists, reports, other panels, and online inquiries. The short description has a length of thirty (30) characters, while the longer description field is equivalent to a memo field, which can support significantly more characters.</p> <p>Enter the name of the individual responsible for this organization. When entering names, you must follow PeopleSoft naming conventions, which are as follows:</p> <p>Lastname,Firstname</p> <p>Note that there is no space before or after the comma.</p>	Agency
<p><u>Step 4: Save the organization</u></p> <p>The organization is now saved and will be accessible to all users with access to the SetID under which the organization was created.</p>	Agency
<p><u>Step 5: Update the appropriate trees</u></p> <p>Add the organization to the designated tree structure so that it is accessible for reports.</p>	Centralized

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Step 7: Notify the requestor that the organization has been added

Send notification to the requestor that the organization has been added and is available for use. The following are acceptable forms of notification:

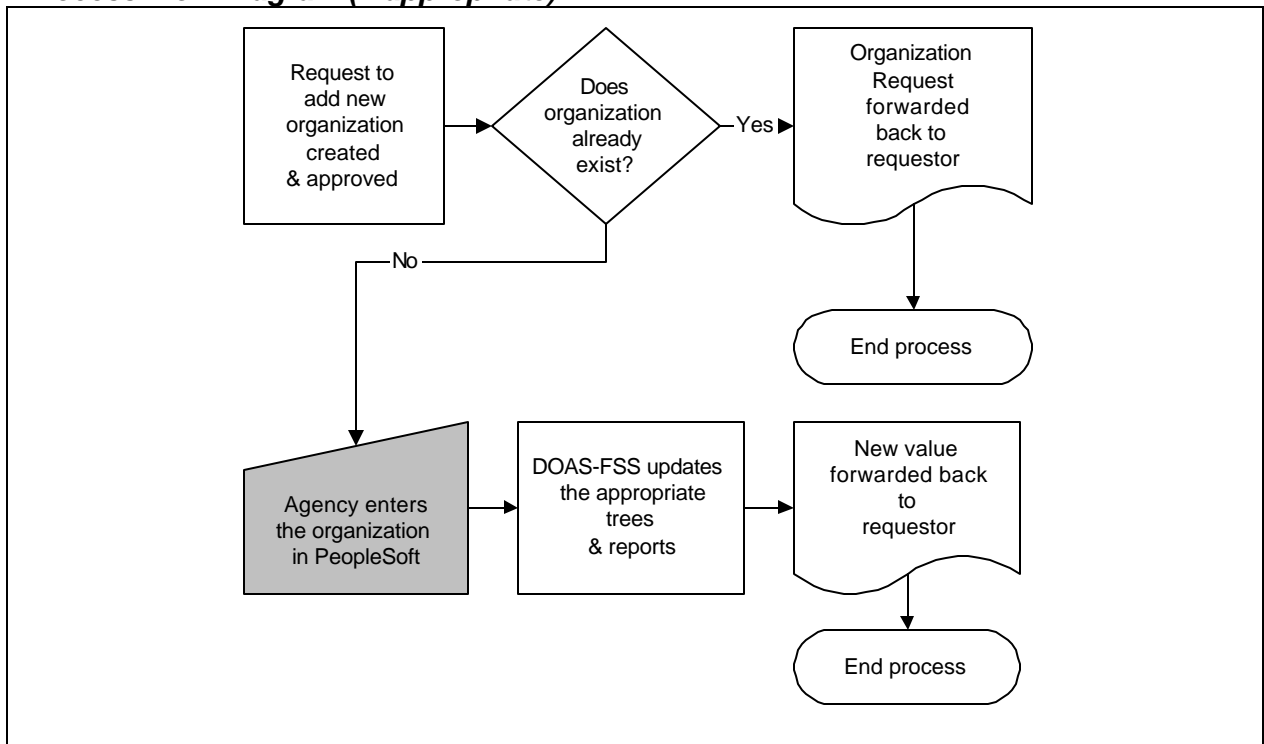
- E-mail
- Facsimile
- Interoffice Memorandum

Agency

Forms Used with Process (#)

**Attach sample form(s) [Organization Change Request.doc](#)

Process Flow Diagram (if appropriate):



Process Signoff

Tested By
Date Tested